

Friends of Willow River & Kinnickinnic State Parks Gifts of Securities

Giving long-term appreciated stock or mutual fund shares offers three-fold tax savings:

1. You avoid paying capital gains tax on the increase in value of your stock.
2. You receive an income tax deduction for the full fair-market value of the stock on the date of the gift (regardless of what Friends of Willow River & Kinnickinnic State Parks nets when it sells the stock).
3. You may deduct up to 30 percent of your adjusted gross income with an additional five-year carry forward. The carry forward provision allows you to use the deduction in future years, potentially spreading your deduction over six years.

Other benefits of making gifts or pledge payments with appreciated securities:

1. Such a gift may not impact your income stream as much as a gift of cash.
2. Using securities may allow you to maximize the gift you wish to make.
3. The gift process (electronic transfer in most cases) can be handled easily by your broker and the Friends of Willow River & Kinnickinnic State Parks Campaign Office.

An example:

If you bought stock many years ago for \$1,000 and it is now worth \$10,000, an outright gift of that stock to Friends of Willow River & Kinnickinnic State Parks would result in a charitable deduction of \$10,000. In addition, you would permanently avoid capital gains taxes on the \$9,000 of appreciation.

Disclaimer:

Information is not intended as legal or tax advice. Please consult with your own professional advisor.

Important:

Before transferring your gift, please contact: Friends of Willow River & Kinnickinnic State Parks at (715) 255-0434 and provide the following information:

1. Your name
2. Broker's name (individual and company) and telephone number
3. Description of security issue and number of shares
4. Gift designation (if any) (Capital Campaign, specific memorial fund, etc.)

It is important that you contact the Campaign Office before donating securities so that we can properly credit your gift.



Electronic Transfer of Securities:

To transfer stock electronically, please give your broker or custodian the following information:

Gifts of DTC eligible securities:

Deliver to DTC Clearing: #0057

For Credit to Account Number: #54117914

Name: Friends of Willow River & Kinnickinnic State Parks

(All deliveries must include client name and FCC account number)

Attention:

Edward Jones

Advisor: Dan Timmerman

325 Vine Street

Hudson, WI 54016

Phone: 715-386-7337

Toll Free: 800-440-7337

FAX: 1-888-267-5318

Account Number: 54117914

DTC Clearing Number: 0057

For your information, Friends of Willow River & Kinnickinnic State Parks is a 501(c)(3) nonprofit organization (EIN 39-1667467).

Please ask your stockbroker or custodian to provide the donor's name at the time of the transfer. Thank you for your generosity. We will be in touch with you as soon as we receive the transfer.

For more information about a stock gift or any other questions, please contact us.

Email: paths@willowkinnifriends.org.

Phone: (715) 255-0434

Paths to Discovery Capital Campaign

Willow River State Park

Friends of Willow River & Kinnickinnic State Parks, Inc.

1034 County Road A

Hudson, WI 54016